
PURCHASING USER MANUAL	1
ADDING AND MAINTAINING USERS	1
INTRODUCTION	1
TO ADD A NEW USER	1
TO ASSIGN SPECIFIC APPROVAL RULES.....	2
TO ADD A USER TO A WORKFLOW AND DEPARTMENT	4
APPROVERS UNABLE TO APPROVE REQUISITION ITEMS.....	5
TO EDIT EXISTING USERS	5

PURCHASING USER MANUAL

ADDING AND MAINTAINING USERS

INTRODUCTION

The Purchasing administrator can:

- Add new users and assign their security and any limits on their approval rules.
- Update existing users.
- Assign users to the Workflows and Departments

TO ADD A NEW USER

1. On the **User Maint** tab, Click **Find New User**.
2. In the **User Lookup** dialog box, type the last name of the new user in the **Last Name** field. (You can type the first few letters of a user's name if you are not sure how it is spelled.)
 - To add an employee from another agency, type the last and/or first name and enter their agency number in the **Agency** field.
3. Click **Find**. If the user cannot be found, contact your payroll administrator to make sure that the person has been added to state payroll records.
4. Click **Select** next to the user's name to add and then click **OK** to confirm adding the user.

Figure 1 - Add a new user

The screenshot shows the 'User Lookup' dialog box. On the left, the 'User Maint' tab is active, and the 'Find New User' button is circled in red. A red arrow points from this button to the 'User Lookup' dialog box. The dialog box has a title bar 'User Lookup' and three input fields: 'Last Name' (containing 're'), 'First Name' (empty), and 'Agency' (containing '140'). Below these fields are 'Find' and 'Cancel' buttons. At the bottom, there is a list of users with 'Select' buttons next to their names. The list includes: TU ANH BOCKENSTETTE, R STEVEN FALTER, DAN GREITZER, JEREMY WINSLOW, MERIDETH HACKNEY, SUANNE KORA, JAMES CARTER, SHARON WEBER, CONNIE HILL, and MARY EVERETT. The 'Select' button next to 'REXFORD REAGAN' is highlighted.

5. Select **Active User** to grant the user access to the application.

6. Select the security or the roles to assign to the user. Some of these roles are related to settings on the **Agency** screen.
 - **Admin** – an administrator for the Purchasing application.
 - **Authorizer** – authorizes the requisition prior to approval. If you enable **Auto Authorize Requisitions** on the **Agency** screen, you do not need an Authorizer.
 - **Coder** – adds fiscal coding to the line items of the requisition.
 - **Approver** – approves the requisition. Add Approvers to the **Workflow(s)** you create on the **Agency** screen. If you create **Req Departments** on the **Agency** screen and enable **Restrict Approval by Department**, add the Approvers to the appropriate requisition departments.
 - **Assigner** – assigns requisitions to specific purchasers. If you do not enable **PO Assigner Required** on the **Agency** screen, you do not need an Assigner.
 - **Purchaser** – purchases the items from requisitions. Purchasers do not need to belong to Workflows. If you create **PO Departments** on the **Agency** screen, add Purchasers to the departments.
 - **Max PO Amt** – Set the maximum dollar amount of the entire purchase order that the purchaser can make.
 - **Max Item Amt** - Set the maximum dollar amount of a single line item that the purchaser can add to a purchase order.
 - **PO Approver** – approves a purchase order. If you do not enable **PO Approver Required** on the **Agency** screen, you do not need a PO Approver.
 - **Receiver** – receives and records the receipt of the items purchased.
7. Click **Add User**.

Figure 2 -Assign security or roles

<input type="button" value="Cancel"/>		<input checked="" type="checkbox"/> Active User	<input checked="" type="checkbox"/> Admin	<input type="checkbox"/> Assigner	<input type="button" value="Add User"/>
Username	ROCHENDA REYNOLDS	<input type="checkbox"/> Authorizer	<input type="checkbox"/> PO Approver	<input type="button" value="Edit User Rules"/>	
First Name	ROCHENDA M Name L	<input type="checkbox"/> Coder	<input checked="" type="checkbox"/> Purchaser		
Last Name	REYNOLDS	<input type="checkbox"/> Approver	Max PO Amt	0.00	
Email	ipopspob@sco.idaho.gov	<input checked="" type="checkbox"/> Receiver	Max Item Amt	0.00	

TO ASSIGN SPECIFIC APPROVAL RULES

Specific approval rules can work in conjunction with creating requisition departments and workflows. For instance, two approvers can be assigned to the same department and workflow, but one could approve items that are fiscally coded with specific PCAs.

1. To assign approval rules, such as limiting an approver to specific Grants or Funds or Budget Units, click **Approval Rules**.

Figure 3 - Approval Rules button

Cancel ☒ Active User ☒ Admin ☐ Assigner Update User

Username ROCHENDA REYNOLDS ☐ Authorizer ☐ PO Approver **Approval Rules**

First Name ROCHENDA M Name L ☐ Coder ☒ Purchaser

Last Name REYNOLDS ☐ Approver Max PO Amt 0.00

Email ipops pob@sco.idaho.gov ☒ Receiver Max Item Amt 0.00

Created by DANA HANSON 8/16/2006 Edit by DAN GREITZER 8/17/2006

- Determine the fiscal codes you want to allow the user to approve. The options are:

- Index (or PCA)
- Grant
- Project
- Subobject
- Fund
- Budget Unit

Save Approval Rules for ROCHENDA REYNOLDS

	All	None	Exceptions
Index	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Grant	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Project	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Sub Object	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Fund	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Budget Unit	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Min Amount	<input type="text" value="0.00"/>		
Max Amount	<input type="text" value="0.00"/> (Use 0.00 for no Maximum)		

- Select either **All** or **None** for each fiscal code.
 - All** indicates that the user can approve *all* Indexes, PCAs, Grants, etc.
 - None** indicates that the user cannot approve any of them.
- Click the **Exceptions** asterisk next to a fiscal code to display the list of specific fiscal codes to select as exceptions to the **All** or **None** choice. For example:
 - If you select **All** for **Fund** and then select several Funds from the Exceptions list, the user can approve requisition items that are coded with all Funds except for those selected.
 - If you select **None** for **Fund** and then select several Funds from the Exceptions list, then the user cannot approve requisition items except for the ones coded with the Funds you selected.

Figure 4 - Approval Rules

Save Approval Rules for ROCHENDA REYNOLDS

	All	None	Exceptions
Index	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Grant	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Project	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Sub Object	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Fund	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Budget Unit	<input type="radio"/>	<input checked="" type="radio"/>	<input type="button" value="+"/>
Min Amount	<input type="text" value="0.00"/>		
Max Amount	<input type="text" value="0.00"/> (Use 0.00 for no Maximum)		

Fund Exceptions

Code	Description
<input checked="" type="checkbox"/> 0001	GENERAL FUND 67-1205,67-1210
<input type="checkbox"/> 0001-01	TEMP FAS CORRECTION
<input type="checkbox"/> 0001-85	ADMIN BOND PMT 0001
<input checked="" type="checkbox"/> 0050	FISH & GAME ACCOUNT 36-107
<input type="checkbox"/> 0050-01	F&G BUDGET STABILIZATION ACCOUNT AGY

5. Enter a minimum dollar amount (**Min Amount**) and/or a maximum dollar amount (**Max Amount**) of a requisition that the approver can approve. The approver will not be able to approve requisition items higher or lower than these dollar amounts.
6. Click **Save** when finished. Approvers will see that requisition items that they cannot approve will be highlighted in the application. Although the approvers can view the requisition items on the **Approval** screen, they will not be able to approve them.

TO ADD A USER TO A WORKFLOW AND DEPARTMENT

If you have created Workflows and Departments on the **Agency** screen, you can add users to them on the **User Maint** screen. If you add your users before creating Workflows and Departments, you can add them on the **Agency** screen when you create the Workflows and Departments. See Creating Workflows and Departments.

1. On the **User Maint** screen, either select an existing user from the user list, or continue with a new user set up:
2. Select a workflow from the **Workflow** drop down menu.
3. Select a **Level**.
4. Be sure **Active** check box is checked.
5. Click **Add**.
6. Continue adding the user to as many workflows as needed.
7. If you have created departments, select a department from the **User Departments** drop down menu.
8. Click **Add**.
9. Continue adding the user to as many departments as needed.
10. Click **Update User**.

Figure 5 - Workflows and departments

The screenshot displays the 'User Maint' screen. At the top, there are buttons for 'Cancel', 'Update User', and 'Approval Rules'. The user details section includes fields for Username (ROCHENDA REYNOLDS), First Name (ROCHENDA), M Name (L), Last Name (REYNOLDS), and Email (ipopspob@sco.idaho.gov). Below these are checkboxes for 'Active User' (checked), 'Admin' (checked), 'Assigner' (unchecked), 'Authorizer' (unchecked), 'Coder' (unchecked), 'Approver' (unchecked), 'Receiver' (checked), 'PO Approver' (unchecked), and 'Purchaser' (checked). There are also input fields for 'Max PO Amt' (0.00) and 'Max Item Amt' (0.00). Below the user details, there are two sections: 'Workflow' and 'User Departments'. The 'Workflow' section has a table with columns 'Workflow', 'Level', and 'Active'. It shows one entry: 'CSC' with level 'L' and 'Active' checked. The 'User Departments' section has a table with columns 'Department' and 'Active'. It shows one entry: 'DSA-Statewide Accounting (Req)' with 'Active' checked. At the bottom, there are buttons for 'Add' and 'Update User'.

Workflow	Level	Active
CSC	L	<input checked="" type="checkbox"/>

User Departments	Active
DSA-Statewide Accounting (Req)	<input checked="" type="checkbox"/>

APPROVERS UNABLE TO APPROVE REQUISITION ITEMS

If an approver cannot approve a requisition or requisition line items:

- They are not part of the requisition workflow.
- They are not part of the Requisition Department and you have restricted approvals by department.
- There are line item(s) with fiscal coding or a dollar amount which their approval rules do not allow them to approve.
- They are not an approver.

Users can click **Approve** next to a requisition and then click a line item **Menu** and **Show Reason** to find out why they cannot approve the item.

TO EDIT EXISTING USERS

1. On the **User Maint** tab, click **Select** next to a user's name.

The screenshot shows the 'User Maint' interface. At the top, there are filters: 'Find New User', 'SCO Admin', 'Active' (selected), 'Non Active', and 'All Users'. Below this is a table of users with columns: Select, UserName, FirstName, MName, LastName, Act, Adm, Auth, Code, App, Asgn, Pur, P, Apr, Rec, Email. The user 'ROCHENDA REYNOLDS' is highlighted with a red circle and a red arrow pointing to the 'Edit User Rules' button in the detailed view below.

Select	UserName	FirstName	MName	LastName	Act	Adm	Auth	Code	App	Asgn	Pur	P	Apr	Rec	Email
Select	DANA HANSON	DANA		HANSON	✓	✓									dhanson@sco.idaho.gov
Select	DANIEL GOICOECHEA	DANIEL	R	GOICOECHEA	✓				✓						dgoicoechea@sco.idaho.gov
Select	RICHARD WRIGHT	RICHARD	K	WRIGHT	✓										rwright@sco.idaho.gov
Select	TAMARA SHIPMAN	TAMARA	D	SHIPMAN	✓										tshipman@sco.idaho.gov
Select	BRANDON WOLF	BRANDON		WOLF	✓										bwolf@sco.idaho.gov
Select	PATRICIA ROLLER	PATRICIA	A	ROLLER	✓										proller@sco.idaho.gov
Select	STEPHANIE CAMARILLO	STEPHANIE	A	CAMARILLO	✓										stephanie.camarillo@trade
Select	CAROLYN MILLER	CAROLYN		MILLER	✓				✓			✓			cmiller@sco.idaho.gov
Select	ROCHENDA REYNOLDS	ROCHENDA	L	REYNOLDS	✓		✓	✓	✓						

Cancel

☒ Active User
 ☒ Admin
 ☐ Assigner
 ☐ Authorizer
 ☐ PO Approver
 ☐ Add User

Username ROCHENDA REYNOLDS

First Name ROCHENDA M Name L

Last Name REYNOLDS

Email ipopsb@sco.idaho.gov

☐ Approvers
 ☐ Max PO Amt 0.00

☒ Receiver
 ☐ Max Item Amt 0.00

☐ Edit User Rules

Created by DANA HANSON 8/16/2006 Edit by DAN GREITZER 8/17/2006

Depending on the changes you want to make, choose from the following:

- Uncheck **Active User** to remove the user's access to the application.
 - Select or deselect the security or the roles to assign to the user (see above). If a person is removed as an **Approver** but left on the workflow, they will not be able to approve requisitions. But if you remove a user as an **Approver**, you should also remove them from the approver level of requisition workflows.
 - Add a user to a **Workflow** or **Department** as described above.
 - To delete a user from a **Workflow** or **Department**, click **Del** next to the **Workflow** or **Department** name.
 - Click **Approval Rules** to edit the user's approval authority (as described above) and click **Save**.
2. When finished making changes to a user, click **Update User**.